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Volunteer Coordinator's Handbook

Volunteer Income Tax Assistance

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The VITA Program

Volunteerism has been increasing nationwide in recent years. However, Volunteer Income Tax Assistance (VITA) is now in its 20th year of service to taxpayers. In 1989, VITA volunteers assisted more than 1,044,113 taxpayers at approximately 7,855 sites.

The VITA Program offers free tax help to people who cannot afford professional assistance. Volunteers help prepare basic tax returns for older, handicapped and non-English-speaking taxpayers. Assistance is provided in the community at libraries, schools, shopping malls and other convenient locations.

Volunteers may take part in various VITA program activities—directly preparing returns, teaching taxpayers to prepare their own returns, managing a VITA site or arranging publicity. Volunteers generally include college students, law students, members of professional business and accounting organizations, and members of retirement, religious, military and community groups. Anyone who wants to help can become involved in VITA. In fact many high school students, assisted by their teachers, participate in VITA.

The Internal Revenue Service provides VITA training materials and instructors. Training is conducted at a time and location convenient to volunteers and instructors. Generally, these sessions are offered in December through January each year.

The emphasis in VITA is to teach taxpayers to complete their *own* tax returns. Many taxpayers will be able to prepare the returns themselves after they acquire the basic skills. Therefore, volunteers are encouraged to offer *self-help VITA assistance*. This assistance invites individual taxpayers or groups of taxpayers to learn to prepare their returns under the direction of a VITA volunteer. A volunteer's role will be that of an instructor rather than preparer. As an instructor, the volunteer will "walk through" the return line by line with the taxpayer, explaining how to complete the form.

Taxpayers who are unable to participate in self-help assistance should be offered *direct VITA assistance*. This assistance involves complete return preparation by volunteers.

Guidelines on how to establish a VITA site and publicize and manage it effectively are included in this handbook. The IRS Taxpayer Education Coordinator will offer further assistance in these efforts.

Starting a VITA Group

Coordinators of each VITA group are responsible for planning, organizing, supervising and promoting all aspects of the community program. In addition, they are responsible for maintaining effective communication with the IRS coordinator.

Before organizing a VITA group, they should be aware of the scope of the assistance VITA volunteers will offer.

VITA Volunteers Will—

- teach taxpayers to prepare their own Forms 1040EZ, 1040A, 1040, and W-4 in self-help VITA sessions
- prepare Forms 1040EZ, 1040A, 1040, and Form W-4 if taxpayers cannot take part in self-help VITA sessions.
- assist taxpayers with state and local returns
- identify all returns with "VITA" or "VITA-T"
- make an entry on a Volunteer Assistance Worksheet each time service is given
- refer taxpayers with complicated returns or questions to an IRS publication or to professional assistance
- quality review all returns prepared under VITA assistance
- remind taxpayers, if necessary, that assistance is FREE
- decline offers of payment

VITA Volunteers Will Not—

- prepare complicated returns
- distribute tax forms
- answer technical questions for which they have not been trained
- refer taxpayers to any one particular practitioner or firm
- accept pay or compensation on behalf of individuals or organizations for providing tax assistance or preparing tax returns

When forming a VITA group, consider these important areas:

1. Availability of the time and the desire to serve taxpayers. Groups that are genuinely interested in performing a service to taxpayers must be willing to devote the time and effort required to prepare returns and answer questions accurately in a courteous and helpful manner.

2. Skills or experience in tax law-related subjects. Volunteer organizations with previous experience in preparation of tax returns generally provide more accurate service.

3. Strong volunteer spirits and availability of organizational skills to assist in VITA coordination. Enthusiasm and organization will allow volunteers to have a rewarding experience.

4. Availability of special skills within the group. For example, volunteers able to speak foreign languages, sign for the deaf or provide clerical support can offer valuable service.

Recruiting VITA Volunteers

Recruiting is a year-round activity. Coordinators should always be alert to individuals who might be interested in becoming involved in the VITA program.

In recruiting volunteer assistors keep in mind the following qualifications:

- Desire to help older, handicapped and non-English-speaking individuals;
- Aptitude for tax work;
- Experience in the preparation of income taxes or academic background in taxes;
- Ability to successfully meet and deal with people from different backgrounds and circumstances;
- Pride in performing tasks completely and accurately;
- Willingness to spend an average of 2 to 4 hours per week on VITA from approximately January 1 through April 15;
- Successful completion of the IRS training program, generally 4 to 5 days in length.

In addition to the preparation of tax returns, volunteers are also needed as site coordinators, publicity coordinators, receptionists to screen taxpayers for Forms 1040EZ, 1040A and 1040 groupings, clerical assistors, technical backups, quality reviewers and interpreters.

Some volunteers have specific goals, such as students who are looking for internship credit, homemakers re-entering the work force and career changers looking for job experience and professionals willing to make a "pro bono" or community contribution.

Studies have shown that the majority of volunteers do so in addition to their regular paying jobs. Although most of them would appear to be available only on weekends or in the evening, more and more people work evening and irregular schedules and on weekends, taking their days off during the week. These include police, fire, emergency and hospital personnel, postal, telephone and utility workers, sales people, computer technicians, service people, the military, news media employees, and hotel, restaurant and transportation employees.

These people could serve as volunteers for a few hours before or after their regular shift or on one of their days off. They may have to be reached at their fulltime place of work with a poster or

a bulletin board notice stressing the need for special people to do a special job in the community.

The most important reasons why people volunteer are:

- To help others;
- To gain a sense of achievement;
- To acquire new skills and training;
- To feel good about themselves;
- To put their skills and abilities to meaningful use;
- A belief in the organization and its work;
- A chance to do interesting and challenging work;

Other reasons include: to get out of the house; to escape boredom; to "test the water" before making a career change; to maintain skills no longer being used; to impress an employer; to gain new status; to gain knowledge of the community and its services; to make new friends; to be with existing friends.

Attracting and Retaining Volunteers

Surveys indicate that the best recruitment approach is a personal one; the best recruiter is another volunteer. Too often we tend to think of recruitment techniques in terms of posters, correspondence, and TV and radio announcements. However, to "make the sale" to a potential volunteer, personal contact remains the best recruitment method. VITA Coordinators may want to give more attention to using "people networks" to reach others. Think what the result would be if each VITA volunteer assumed the responsibility of finding one other person to volunteer during the next filing season, and then all of the old and new volunteers did likewise!

The volunteer experience is a way of fulfilling basic human needs, and it is this fulfillment that draws people into volunteer experiences and keeps them there. In other words, people want to be appreciated and to know that what they do is significant. Among the various motivations to volunteering are: reaching a personal goal, feeling that what the volunteer is doing has real purpose or contributes to human welfare, the need to have responsibilities that challenge within their range of abilities and interests, and seeing that progress is being made in realizing these goals. Some of the reasons why volunteers remain committed are:

1. They feel appreciated
2. They can see their presence does make a difference
3. There is opportunity for personal growth
4. They receive private and public recognition
5. They feel capable of handling the tasks offered
6. There is a sense of belonging and teamwork among co-workers
7. They recognize that something significant is happening

because the group exists
8. Their personal needs are being met.

VITA Assistance Techniques

Volunteers offer two types of tax assistance at a VITA site. They assist taxpayers in the preparation of Forms 1040EZ, 1040A, 1040, and W-4 by offering self-help VITA assistance or direct VITA assistance.

VITA assistance includes teaching people to fill out their own returns once they acquire the basic skills. This is why VITA offers self-help assistance—taxpayers prepare their own returns under a volunteer's direction. Volunteers "walk through" the return line by line with taxpayers and explain how to complete the form.

Taxpayers who cannot take part in self-help assistance should be offered direct VITA assistance, where volunteers complete returns.

Quality Return Preparation

The First Time

If you have decided to schedule taxpayers for an appointment or if taxpayers ask, "What do I need?," it is a good idea to give them some advice as to what they should bring to the site so that preparing the return can go as quickly as possible. The following list may be helpful:

IF YOU....	....YOU WILL NEED TO
Received the Federal and State forms packets	Bring those forms
Received wages	Bring the W-2s you got from your employer
Received Social Security, Railroad Retirement, Unemployment and/or Welfare	Know the amount you received
Want to itemize deductions	Bring a list of your medical, taxes, interest, contribution, and miscellaneous expenses
Filed a tax return last year	Bring a copy of your prior year tax return

ALWAYS BRING YOUR SOCIAL SECURITY CARD OR A RECORD OF YOUR CORRECT NUMBER

Hit the nail on the head.
Double check the math and the tax.

Self-Help Assistance Techniques

Volunteer's Role in Self-Help

The volunteer's role will be that of an instructor rather than preparer. As an instructor, volunteers will "walk through" the return line by line with taxpayers and explain how to accurately complete the form. The tax return is actually prepared by the taxpayer rather than the volunteer.

As an instructor, a volunteer must be able to control the direction of the instruction, which may be directed to an individual or group of individuals. Taxpayer questions must be answered clearly and concisely. However, take care to avoid long, time-consuming discussions and individual situations which may slow the progress of other taxpayers in the group. Instructors should promote taxpayers' cooperation in the self-help program through their enthusiasm. Instructors also should convey their confidence that the taxpayers are capable of preparing their own returns.

Prepare for Self-Help Assistance

- Since self-help assistance may be offered to individuals or groups of individuals, you must arrange for adequate facilities. If a large group is to be assisted, classroom space should be available. Remember to allow for the taxpayers' privacy.
- Use the checklist below to be sure that all supplies, equipment and training aids are available.

Self-Help VITA Assistance Checklist

Supplies and Equipment:

1. Pens and pencils
2. Scratch paper
3. VITA overprinted returns and carbon paper
4. Tables or desks
5. Wastebaskets
6. Staplers
7. Volunteer Assistance Cards
8. Quality Review Envelopes
9. Earned Income Credit Job Aid
10. Schedule of all VITA assistance sites: direct and self-help.

Instructor Aids:

1. Tax form blowups
2. Chalkboard and chalk
3. Easel
4. Pointer or ruler
5. Publication 17 and appropriate reference materials
6. Instructions for preparing Forms 1040, 1040A, 1040EZ, and W-4
7. VITA Coursebook
8. Calculators

Self-Help Methods

Basically, there are two methods of self-help assistance: individually paced method and group-paced method. The essential difference is that under the group method each taxpayer works at the same pace, while under the individual method each taxpayer works at his or her own pace. Whether self-help assistance is offered to individuals or groups of individuals will be determined by the volume of taxpayers visiting the site. For larger groups, it is helpful for an instructor to be accompanied by a roving assistor. Further instructions to volunteers on self-help assistance techniques are included in Module I of the Volunteer Assistor's Guide, (Publication 678). Remember, whatever method is selected for your VITA site may need to be adapted slightly to meet the needs of your specific VITA group.

Direct Assistance Techniques

Volunteer's Role in Direct Assistance

The volunteer directly prepares the taxpayer's income tax return based on information provided by the taxpayer or answer tax-related questions. Volunteers should probe for all tax information needed to claim every credit or deduction the taxpayer may be eligible to claim. Volunteer Assistor's Guide, (Publication 678), includes information on interviewing techniques.

Prepare for Direct Assistance

- Volunteers assist individual taxpayers or couples in preparing their returns. Adequate space should be available to provide for a taxpayer's privacy.
- Use the checklist below to be sure that all supplies and equipment are available.

Direct VITA Assistance Checklist

Supplies and Equipment:

1. Tax forms and schedules
2. Calculators
3. Pens and pencils
4. Scratch paper
5. VITA overprinted returns and carbon paper
6. Tables, desks and chairs
7. Wastebaskets
8. Staplers
9. Volunteer Assistance Cards
10. Quality Review Envelopes
11. Earned Income Credit Job Aid
12. Schedule of all VITA assistance sites: direct and self-help.

Direct Assistance Methods

- Volunteers directly prepare tax returns for individual taxpayers or couples. Taxpayers may be screened into Forms 1040, 1040A and 1040EZ categories upon arriving at the site. The site coordinator may designate volunteers to prepare one form or the other. This can reduce waiting time for taxpayers filing Form 1040A or 1040EZ. Taxpayers may be assisted on a first-come-first-served basis or by appointments. The style of assistance offered will vary, depending on the facilities available, volume of taxpayers visiting the site and the local needs of your specific VITA group.

The Duties and Responsibilities of the IRS in VITA

The role of the IRS is to provide training, technical assistance, forms and publications, and to assist with publicity and organizational efforts.

IRS Taxpayer Education Coordinator—Coordinators contact potential volunteer organizations, arrange training, advise volunteer coordinators, and supply needed forms and training materials.

Training—Training tailored to the background of participants takes place at a time and location convenient to volunteers and instructors. Generally, the sessions are offered in December through January each year.

The IRS coordinator from your district office will provide free VITA course materials to the volunteers. The volunteers should keep these materials for future reference.

The training materials include the Volunteer Assistor's Guide. The guide covers Forms 1040A and 1040EZ, the basic 1040, basic W-4, and information of interest to the elderly. It is divided into modules and concentrates on forms preparation.

Generally, separate classes are held for new and experienced volunteers. New trainees receive a four-to-five day basic course while experienced volunteers attend a one-to-three-day refresher course. All volunteers may take the VITA training on a self-instructional basis.

Training includes testing to ensure accurate service to VITA taxpayers. All volunteers must achieve a minimum score on the VITA test to serve as a VITA assistor. Those who do not pass may review the course materials again and take the VITA retest. Anyone who does not achieve the minimum score on the retest should be encouraged to participate in another program activity, for example, program coordination or publicity.

Volunteer coordinators are encouraged to schedule additional training sessions for instruction in state, city, and county tax forms. Since almost every area has a different tax system, it is up to you as coordinator to arrange for this additional training through state or local agencies. The option of including additional training in the same schedule with IRS training should be explored with IRS and state or local officials.

On occasion, experienced volunteers may be given an opportunity to be VITA instructors. IRS will provide instructor workshops for these individuals.

Technical Assistance—IRS assistance following training is designed to help volunteers provide accurate service. Technical assistance on tax questions is available by calling the IRS VITA Hotline at a special toll-free telephone number provided for volunteer use only. IRS employees also visit VITA sites to observe activity, to discuss needs and progress with site coordinators and to offer technical assistance.

Establishing a VITA Site

As coordinator, you will locate community sites, set up assistance time schedules for the filing season and assign volunteers to staff sites.

Choosing a Site

In selecting a site, choose locations convenient to the VITA target groups—older, handicapped, and non-English-speaking individuals. If possible, choose a site with adequate parking facilities or accessible by public transportation.

Community centers, libraries, banks, colleges, social action agencies, courthouses, city halls, church halls, shopping malls and cultural centers can make good VITA locations. Try to secure a site that assures at least some degree of privacy for taxpayers while their returns are prepared.

Select locations where a telephone is available so volunteers may call the VITA Hotline for technical assistance. Locating a site where people go for other types of assistance, for example voter's registration and driver's license applications, naturally produce traffic of potential VITA clients.

Setting Up a Time Schedule

Select the dates and times your site will be open. Keep in mind where your site is located and when people generally will be able to get to you. If you open your site in the evening hours, but the community does its business during the daytime, you and your volunteers may have few returns to prepare. Opening your site during the times that the people in the community do their shopping, marketing and other personal business will greatly enhance your volunteer effort. This is particularly important in the first year that a site is operational. Those who need assistance must know where to find you and your volunteers. Once you've set up the schedule—keep it. People will be able to count on you.

When you finalize the schedule, contact the IRS VITA coordinator. Provide the name and address of the site, as well as the dates and times of assistance. This information will be used to publicize your site. Getting this information to the IRS early can help make your site a success. Since VITA filers are often refund filers and these taxpayers generally file as soon as they get their W-2's, they may look for your site in mid-to-late January. However, you and the IRS need lead time to publicize the availability of the site. Do not wait until January to decide. Confirming your site in October or November can save you from waiting for taxpayers. If this is not your first year for a site, often confirming last year's schedule is all it takes! Timely publicity for a timely opened site is the key to success.

Schedule Your Volunteers

You can only staff your VITA site successfully after you know the

number of volunteers who have completed the IRS training course. Confer with your volunteers to determine their availability. Whether you rotate volunteers or schedule the same volunteer to staff a site every time it operates, you should consider this important point—always schedule an experienced volunteer with one or more less-experienced persons. Setting up a VITA site with only one volunteer may not be desirable. There is neither opportunity for the quality review of returns prepared by the single volunteer nor availability of additional assistors if many taxpayers unexpectedly converge on the VITA site.

Don't be afraid to change the number of volunteers at a site if the "traffic flow" warrants it. If necessary, you may have to switch a VITA site from one location to another and maintain the flexibility to match your VITA program to the needs of those you assist. Because IRS maintains a list of VITA centers to refer taxpayers for assistance, notify your IRS VITA coordinator of any change in times or locations.

Most VITA centers are open certain hours and assist taxpayers on a first-come-first-served basis. This is usually the best way to start out at a new VITA site. Some VITA groups arrange service by appointment. If your center is located where someone is available to take telephone calls and make appointments or where a sign-up sheet can be posted, you may want to try this method. Allow adequate time for each taxpayer.

Other VITA Efforts

In addition to the more common VITA site arrangements, you may want to arrange for other types of assistance. For example, the IRS sometimes gets requests for service to shut-ins, which cannot be filled, and would be pleased to refer such requests to a VITA volunteer, if you have someone willing to do this. Or, you could advertise service to shut-ins in your community. Hospitals or nursing homes, if contacted in advance, may arrange for days during the filing season for your volunteers to visit.

Your knowledge of your community may give you other ideas of ways your volunteers can be most effective. There may be neighborhoods of non-English speaking individuals in need of your assistance. You may also be aware of groups with other special needs. For example, your VITA site may provide interpreters to assist hearing-impaired taxpayers.

Another new concept in VITA assistance is a VITA-mobile. VITA groups use mobile units to take the VITA program to the people, especially in rural areas.

Volunteerism

"We live in a society that always has depended on volunteers

of different kinds—some who can give money, others who give time and a great many who freely give their special skills, full time or part time. If you look closely, you will see that almost anything that really matters to us, anything that embodies our deepest commitment to the way human life should be lived and cared for depends on some form—more often, many forms—of volunteerism."
Margaret Mead and Rhoda Metraus,
Aspects of the Present
Courtesy of William Morrow and Company, Inc.

Managing a VITA Site

Site coordinators and alternates should be assigned to all permanent sites. The coordinator or alternate should be present whenever the site is open and is responsible for the following administrative duties:

- Maintaining a list of all volunteers scheduled for each date and of home phone numbers;
- Ensuring that sites are open as scheduled and adequately staffed;
- Checking that sufficient tax forms and supplies are available;
- Establishing an on-site quality review system by designating an experienced volunteer as a quality reviewer when possible or by encouraging volunteers to exchange returns for review;
- Providing technical assistance and encouraging volunteers to use the toll-free VITA Hotline;
- Observing that volunteers use [redacted] Income Credit Job Aid and Table;
- Checking that volunteers offer [redacted] district office quality review envelope to all taxpayers except when a payment is required;
- Observing that returns are marked "VITA" and "VITA-T" appropriately and that volunteers make an entry on a Volunteer Assistance Card to count the number of taxpayers assisted and to record the type of assistance provided;
- Assigning a volunteer receptionist to sign-in taxpayers so they are assisted on a first-come-first-served basis, and to screen taxpayers for Forms 1040EZ, 1040A, and 1040 groupings, if appropriate;

- Monitoring taxpayer traffic against available volunteers and announcing that individuals signing in after the cut-off time do so with the understanding that they will be helped only if time permits;

- Providing taxpayers with information on other assistance dates and times if they are turned away;

- Ensuring that taxpayers with more difficult tax questions are referred to the appropriate IRS publication or to seek the assistance of a professional preparer;

- Observing that volunteers greet taxpayers courteously and provide efficient service; and

- Reporting any problems to the IRS VITA coordinator.

Managing Volunteers:

People Helping People

Volunteers are very much like other workers with one important difference—they don't get paid! And they usually don't get any fringe benefits either. So, since they don't get the rewards of the paid staff, they really need to get a sense of satisfaction from what they do. Volunteers want to work in jobs where they can give the amount of time they have available because it is something they want to do; it fulfills them in some way. The problem is designing such a job for volunteers and keeping them motivated. There are four critical elements:

1. "**Turf**" — The volunteer should have full responsibility for the client or project. Volunteers get low satisfaction from doing just one function of a job, such as an intake interview, then passing the client on to a paid staff member, who carries out the "higher-level" functions. Even in the case of envelope stuffing, the volunteer gets more satisfaction out of assuming responsibility for all of the functions of the job, such as collating, stapling, folding, stuffing or stamping, rather than just one of these functions. If efficiency dictates one person handling each of these functions, then the volunteer will get more satisfaction from the social aspect of being with other people and this aspect should be emphasized.

2. **Authority** — The volunteer should have the authority to think as well as do the job, which means the right to plan, organize, decide and evaluate what he or she does. Although the manager does not abdicate authority in this area, the volunteer feels more involved and more committed to staying if allowed to

participate in this process. For example, the volunteer may be asked to recommend what should be done rather than simply be told what to do.

3. **Results** — Make sure that volunteers are held responsible for achieving results rather than just performing a set of activities or duties. Most job descriptions, especially those for volunteers, are not defined in terms of results. For example, volunteer motivation would be higher if VITA volunteers were "helping taxpayers to complete their own returns" rather than "filling out tax forms" or "making taxpayers aware of their rights and responsibilities under the tax laws" rather than "handing out tax information pamphlets." The key question is "What do we want these volunteers to accomplish in these three hours per week?"

4. **Evaluation** — How to measure whether or not the results are being achieved. Although number of returns prepared and number of hours worked are obvious necessary indicators, we also need to be sensitive to the more subjective elements, such as how the clients feel about the service, how the assistors feel about the service they are providing and the quality of the relationships that may have developed, which is a primary motivator for many volunteers.

Volunteer Management Tips

There are more than 100 different ways that a manager or coordinator can give recognition and encouragement to volunteers to help make up for the lack of compensation. Here are just a few of them:

- Smile.
- Be verbal.
- Take time to explain.
- Carefully match volunteer to job.
- Tell your volunteers "You did a good job" each time they do.
- Involve them in planning and execution.
- Say "Please" and "Thank You" in great abundance.
- Call your volunteers by name. People like to hear their name.
- Take a personal interest in them—where they live, their children.
- Have a welcome coffee reception.
- Put up a volunteer suggestion box.
- Say "Good Morning" and "Good Afternoon."
- Create pleasant surroundings.
- Treat them to a soda or coffee.
- Bring in a coffee cake or donuts.
- Recognize their birthday.
- Have a volunteer of the week or month recognition.

- Respect their wishes.
- Include them in staff meetings.
- Hold rap sessions.
- Give them additional responsibility.
- Keep challenging them.
- Post honor roll in reception area.
- Award plaques or certificates.
- Have local newspaper do a human interest story.
- Commend them to higher management
- Relay words of appreciation from others.
- Celebrate outstanding achievements.
- Write them thank you notes.
- Plan a "Recognition Edition" of newsletter.
- Praise sponsoring group or club and volunteer to group.
- Be a real person.

Identifying and Filing VITA Returns

The VITA Designation

Congress annually asks the IRS to provide the number of returns that were filed using the VITA acronym, or designation. Therefore, for training and statistical purposes, IRS requests that all Federal returns be identified with a VITA designation. This will enable IRS service centers to count the number of VITA returns prepared nationwide, as well as the number of mathematical and procedural errors. No individual records are kept of these errors. The information is used to plan next year's program and revise training materials.

Forms 1040EZ, 1040A and 1040 will be preprinted with "VITA." If returns are prepared during a self-help VITA session, volunteers should write "-T" after "VITA." If preprinted forms are not available, volunteers should write "VITA" or "VITA-T" through both lines in the preparer's block on Forms 1040A and 1040, and below the signature line on Form 1040EZ. If the site code is placed on the return, it should be entered below and to the right of "VITA."

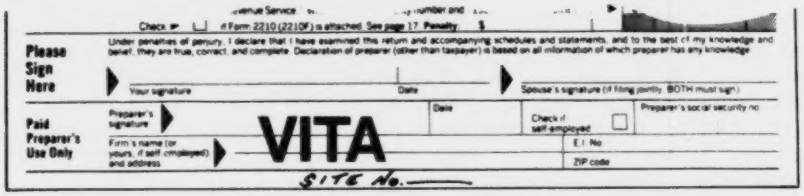
Returns identified with "VITA" should be substantially (over 50%) prepared by the volunteer. Volunteers should be reasonably sure that taxpayers will file the return as prepared. If only questions are answered to assist the taxpayer, the return is not marked VITA. Schedules and attachments should not be identified with the acronym.

If the taxpayer inquires about the VITA designation, volunteers should explain that this is merely a way of counting his or her return as one of thousands prepared in the program. This in no way affects the likelihood of an IRS examination (audit) of the

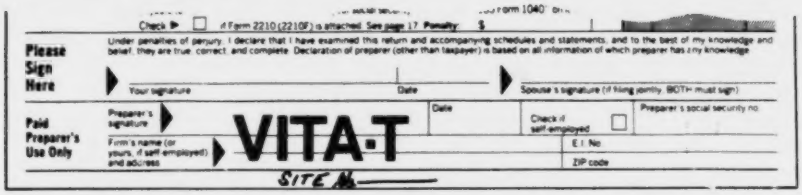
taxpayer's return.

This identification does not alter the role of the VITA volunteer as an assistor rather than a preparer. Since volunteers receive no pay or compensation for services provided, they are not legally liable for the return.

Returns prepared by direct VITA assistance (volunteers preparing the returns) are identified as "VITA."



Returns prepared by self-help VITA assistance (taxpayers preparing the returns) are identified as "VITA-T."



Identifying Scannable 1040EZ Returns

The 1040EZ is scannable by computer. The computer can't "read" the VITA designation since it only reads numbers. In order for the computer to be able to count the number of 1040EZs completed by VITA volunteers, volunteers will need to identify these returns with an additional number code. The number "5" should be placed in the "For IRS Use Only" block, if the VITA return was prepared using the self help method. use the number "4" if the volunteer directly prepared the return.

Filing Completed Returns

VITA volunteers are not responsible for sending in the completed tax return, rather, this is the responsibility of the taxpayer. If the taxpayer chooses to send the return to the service center, he or she should use the envelope provided in the tax package; if it is available. Using the envelope and label provided in the tax package will speed up the processing of the return. If the information on the label is not correct, make the necessary corrections directly on the label. Put the label on the final copy of the

return. It is difficult to remove if a mistake has been made and a new copy started.

In every case where a return is prepared the taxpayer should be given a copy for his or her records.

Volunteer Assistance Worksheet

Returns marked "VITA" and "VITA-T" are counted by the service centers to see how many Forms 1040EZ, 1040A and 1040 are prepared. Volunteers also will give other types of assistance. They may prepare state and local tax returns or answer tax-related questions. Therefore, all volunteers are asked to complete a Volunteer Assistance Worksheet each time they work at a site. This will capture the extent of all volunteer assistance.

One line should be completed for each taxpayer assisted and the appropriate columns filled in. Assistance for 20 taxpayers may be recorded on one worksheet.

Volunteers should be sure to check the correct program box. A separate worksheet should be filled out for self-help VITA assistance and direct VITA assistance. Complete instructions are provided on the back of the worksheet.

Worksheets will be returned to the IRS Taxpayer Education Coordinator. Volunteers should use a preaddressed quality review envelope and check the "REPORTS" box in the left corner. It is important to mail these promptly as directed by your coordinator so that accurate statistics can be kept.

Volunteer Assistance Worksheet

Name _____

Date _____ Site Code _____

Check appropriate program catagory and enter the site code.

☐ VITA

☐ TCE Number of Hours _____

☐ Library

Please complete this worksheet each time you work at a site to help us determine the extent of VITA, TCE, and Library assistance. If you provide assistance in more than one program, please complete a separate worksheet for each program. Also, enter the number of hours used for each assistance effort.

Department of the Treasury
Internal Revenue Service
Form 8522 (Rev. 9/98)

Type of Assistance

	Taxpayers	Married Filing Joint Returns	Individual Federal Returns	W-4 Assistance	State and Local Returns	Other Assistance
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
Totals						

See Other Side for Instructions

The VITA Hotline

A special toll-free telephone number will be available exclusively for VITA volunteers to call for technical assistance. Volunteers should identify themselves as VITA volunteers when they call. This number is for technical information only. Any order for forms or schedules should be requested through the IRS Taxpayer Education Coordinator or usual channels. The special phone number should not be given to taxpayers. The specific number and schedule of hours will be announced by instructors in training class or by the Taxpayer Education Coordinator.

Privacy

It is the responsibility of the VITA coordinator to instruct volunteers that information provided by taxpayers is strictly confidential. Volunteers should not, under any circumstances, discuss information about any returns prepared with anyone. Credibility of the VITA program will be lost if disclosure of information is made to unauthorized individuals.

To further enhance the privacy of taxpayers who come to VITA, try to arrange the assistance area so that other taxpayers cannot see or overhear the information being given to a volunteer. While one volunteer may need to share taxpayer information with other volunteers or with IRS personnel to get technical assistance or for quality review purposes, every effort should be made to give information only to those with "a need to know" and with the taxpayer's approval.

FREE Assistance

The taxpayer should be aware that assistance is free as shown on the posters displayed at the site. However, some taxpayers may be grateful and may not have read the signs at the site. Since a volunteer cannot solicit or accept compensation; at times it may be necessary to remind taxpayers that VITA assistance is FREE.

Occasionally a volunteer may charge for his or her assistance. If you believe a volunteer is charging taxpayers, please notify the Taxpayer Education Coordinator so that this individual can be dropped from the program.

Quality Review

On-Site Quality Review

Improved quality always is a goal of the VITA Program. To help ensure quality of assistance at the VITA center, an on-site review

program should be established to check prepared returns before they are returned to the taxpayer. All returns prepared during self-help VITA assistance and direct VITA assistance must be thoroughly reviewed. Reviewing completed returns could prevent the taxpayer from receiving an error notice from the IRS. Designate one volunteer to review returns or, at smaller sites, encourage volunteers to review each other's returns.

District Office Quality Review Envelopes

Pre-addressed envelopes with district office addresses will be available for use at the VITA site. These envelopes should be offered to all taxpayers for use in mailing their completed return except when a payment is required.

The purpose of the district office envelope is to send returns to the IRS quality review office so that a random sampling of VITA returns can be reviewed. This will enable the IRS to identify quickly error trends and misunderstandings on the part of volunteers early in the filing period. The IRS VITA coordinator will then notify you of the most common errors so you may alert volunteers. You may decide to provide additional tax information to volunteers or hold a VITA refresher class on certain topics. Contact the IRS VITA coordinator for assistance with these efforts.

Using district office quality review envelopes could delay processing of the return for a few days. After the return is reviewed, it is forwarded directly to the service center. If a taxpayer chooses to mail his/her return immediately to the service center, instruct volunteers to provide the correct address if the taxpayer does not have the tax package envelope. However, encourage all volunteers to offer the district office envelope to all taxpayers except when a payment is required. If the question is raised, instruct volunteers to explain that use of the district office envelope will not increase the likelihood of an examination or otherwise affect the return.

Points on Quality

As coordinator, you can ensure quality by encouraging volunteers to take the following actions.

- Use a calculator to verify mathematical computations.
- Use the Earned Income Credit Job Aid and Table.
- Refer to the coursebook and Publication 17 when in doubt.
- Call the VITA Hotline for technical assistance or consult the technical back-up at the site.
- Allow all returns to be checked by a quality reviewer.

Evaluating the VITA Effort

As your VITA program operates throughout the filing period, you should be thinking about how it can be improved. Maybe your site needs rearranging to offer more privacy, maybe you should schedule additional or fewer volunteers for a particular time, and so on. You should be alert to changes that might improve your VITA center and ask your volunteers for their suggestions.

The end of the filing period is a good time to think back over your total effort and make notes to yourself about different approaches you would like to try next time. If for some reason you have decided not to be a VITA coordinator next year, a written summary of your program and your suggestions will be invaluable to the next coordinator.

It is a good idea to have a meeting with all of your volunteers to thank them for their work and to get their suggestions for program improvement. The IRS is interested in what it can do to improve VITA, so be sure and discuss your ideas with your IRS coordinator.

The IRS would like to recognize VITA volunteers and organizations for their dedication during the filing season. Certificates of appreciation are available to present to individuals and organizations who have made noteworthy contributions to the program. Please provide your IRS coordinator with a list of names you recommend for certificates.

VITA Publicity

Overview

Building a better mousetrap is the first step to financial success. Telling customers about it is the second—and equally most important—step.

This maxim can apply to your VITA program. The best organized VITA program in the country will never get off the ground without a strong publicity effort.

How do you plan the publicity? Well, an announcement of operating hours in January is a start, but only a start. Remember, you'll need to announce when you're going to be open *before* you actually begin.

One good approach is to take some time up front, preferably in November, and consider all the possible means of spreading the word about your free services. In this early planning stage, don't be concerned about placing information ideas in order. Get together with the IRS and other VITA coordinators and plan creatively. Write the ideas down as they come up.

Here are some starter thoughts: TV spots, TV talk shows, TV interviews, TV public service programs, radio spots, radio talk

shows, radio interviews, radio call-in shows, TV cable flash cards, envelope stuffers, bulletin board posters, large window posters, employee publications, bookmarks, flyers, skywriters, newspaper releases, columns for the elderly newspaper public service bulletin board columns, city hall community service columns, consumer columns, answerphone messages, city hall community service listings, other government agency community service listings, religious publications, church bulletins, church newsletters, billboards, bus cards, etc.

Get the idea? When the discussion is over, you will have plenty to choose from.

Next, select the items that are suited to your neighborhood. Remember to include items in languages other than English, where needed.

For the sake of discussion, let's call each one an action item. Now set up an action item schedule. The schedule of actions should stretch from your announcement of operations in early January to the final pitch during the last week of the filing period.

Reviewing the information items, you will find that a few will be continuous message bearers. Among these are posters, bookmarks, community service listings, billboards, etc. To be most effective these items should be set up to start telling the story simultaneously with your January announcement. The press ordinarily will be interested in your kick-off. Give them the opportunity to share it and report it.

Follow through with a different action item—talk show, stuffers, employee publications, elderly column, bulletin board, consumer column, public speech, radio spots, radio public service announcements, TV public service announcements, etc.— each week to keep your service before the eyes of the public.

Your publicity activity is limited only by your ingenuity. Finally, the bottom line. How can I tell if my publicity program is effective? Check the traffic in your VITA centers.

Suggestions

You as the VITA coordinator are the key to successfully publicizing all aspects of your VITA program. Here are some guidelines which have proven helpful to other coordinators in selecting and developing materials.

1. Tailor the suggested news releases, television and radio spots, etc., to reflect information about your program.
2. Make a list of the media where you want this information publicized.
3. Contact your local IRS VITA coordinator for assistance, if needed. The IRS coordinator should be informed of your

publicity plans. In some areas, the IRS VITA coordinator may take your information and make the contact for you to avoid more than one coordinator making the same media contact.

4. Deliver the information items to the media and encourage their use.
5. When contacting the media, say you have a news item of community interest. Avoid using the term publicity, since this implies free advertising.
6. Smaller daily or weekly newspapers are generally more receptive to publicizing community service information.
7. Bookmarks, flyers, stuffers, bulletins, and posters are also effective means of publicizing your program.
8. Contact the local managers of businesses for approval to display posters or to place stuffers in employee envelopes or letters.
9. Arrange with churches for information to be placed in church bulletins.
10. Employee publications are possible outlets. Contact schools, colleges, and clubs for approval to place posters on their bulletin boards.
11. Finally, consult the timetable at the back of this book for suggested action dates on publicity items.

Some sample information items are included in a later section. Your IRS coordinator will have other items available. You may choose an IRS-prepared item or develop your own.

You are most familiar with the taxpayer your program will assist. Therefore, you can best choose whether, for example, to place posters at the local supermarkets or releases in the daily or weekly paper. Ask yourself these questions: Who needs the assistance you are providing? What do they read? What business and recreation centers do they frequent? What radio and TV stations do they prefer? Where do they work? The answers will usually point you to the kind of media that will be effective in publicizing the program in your area.

Media

A number of media are available to the VITA coordinator. Among the most useful are:

1. Television
2. Radio
3. Newspaper

4. Other—posters, leaflets, varied publications, word of mouth.

Let's talk briefly about each one.

TV—Television is an excellent medium for wide exposure. But there is a major drawback in trying to use TV. Because air time is expensive, it is sometimes difficult to obtain. Local TV news teams, however, are often anxious to cover events of civic importance—the first day of operation of your VITA site, for example. Contact the station's news director one to two weeks in advance of the event you'd like covered. Don't expect help from the director if you wait until the last minute to ask for coverage.

Try to arrange an appearance for yourself or a volunteer on local talk shows or television noon news programs if such programs exist in your area. Ask that your VITA location and hours be included in televised "community calendar" schedules along with the time of other local events—paper drives, church bazaars, and the like. In some communities cable TV is available.

When you appear on TV or submit "calendar" information, be certain you relay specifics rather than generalities. Assistance locations, days and hours of service and emphasis on the "people helping people" concept of VITA should be stressed. From January through April 15, when nearly everyone is preoccupied with tax-related problems, the very mention of "free tax assistance" is probably enough to catch a television reviewer's attention.

Radio—Radio is another high exposure medium. As with TV, local radio stations devote considerable time each day to public service announcements and may be willing to mention your VITA site.

In order to get broadcast time, you must compete with other organizations. Your chances of getting air time will be enhanced if your copy is neat and legible without the need for revision. Be certain your copy is the proper length. Public service announcements (PSA's) are most commonly 10, 20, 30 or 60 seconds long and should be tight, crisp, and conversational. If it's difficult for you to determine how long your copy is, use this general rule of thumb: two written words equal one second of air time. After you draft an original PSA, read it aloud several times. Are the sentences short enough to be read comfortably?

You must decide in advance whether you want your PSA to be read on the air by the disc jockey or announcer ("live copy") or whether your announcement should be taped and rebroadcast throughout the radio day. While you're giving your attention to the length, style, and clarity of your PSA, remember to consider content—include the specific type of assistance your group offers, for whom it's offered, and the time and place it's offered. Sample PSA's can be found in the back of this book.

Newspapers—In many areas, newspapers will be the most effective medium for publicizing your program. Securing information about circulation will be useful when selecting a newspaper; however, this is not the only factor to be considered. A metropolitan daily may not be as well read as a neighborhood weekly or "shopper" type paper. Consideration should be given to newspapers which are published for minorities or special interest groups such as the Spanish-speaking, labor groups, or company employees.

Do not wait until the day your VITA site opens to plan your newspaper campaign. Personal contacts with newspaper editors are best and items of human interest or unusual circumstances should be relayed promptly. Use the sample news releases as examples and the timetable as a guide. Both can be found in the back of this book.

NOTE: In major metropolitan areas the IRS may already be doing much of the above publicity for you. Talk with the VITA coordinator to find out what's being done, and what you may need to do to supplement it. Even if IRS has provided publicity for you, don't forget personal contacts with the local media. Local papers are interested in local events. And if you're a local resident, it's hard to turn you down—especially if you have a local news story.

Other—Word of mouth is probably the best type of publicity. Unfortunately, in the beginning stages of your VITA operation, not very many people may know about your program or its location. Therefore other means must be utilized.

Bookmarks and flyers are effective throughout the filing season. These should be drafted early. Once you have the printed copies, you should contact schools and libraries or other organizations to distribute them.

Posters may be obtained through the IRS coordinator or you may develop your own. Posters are an excellent means of advertising your center. Contact the managers of businesses for approval to display the posters in store windows. Bulletin boards in public places such as rental offices of low income housing may also be good display areas for posters. Posters may be used to announce your hours at the VITA location.

Church bulletins can announce VITA locations and operation hours. Contact the clergyman or other designated individuals for approval.

Organizational or company newsletters can make individuals aware of your program. Provide the information to the president of the organization or company.

Clubs, schools, and colleges often will provide billboard space, to make announcements or circulate written information about your VITA center. Contact the president or superintendent for approval. In recent years, outdoor billboards have proved to be an

effective way of publicizing VITA. IRS districts throughout the country have used either a national format or a localized version in cooperation with local outdoor advertising companies as a public service to taxpayers.

State or local social service agencies may be willing to inform their clients about VITA. Posters, flyers, or stuffers can be given to these groups.

Sample Information

Sample Television Public Service Announcement (30 seconds)

Video	**Audio**
Slide with volunteer Income Tax Assistance Program Hours: Locations:	Free assistance with income tax preparation is available from the Volunteer Income Tax Assistance program, sponsored by the Internal Revenue Service. VITA volunteers will help older, handicapped and non-English speaking taxpayers in filling out basic Forms 1040, 1040A and 1040EZ. VITA assistance is available at (times and locations) or call (telephone number).

Sample Television Public Service Announcement (10 seconds)

For more information contact: (name & telephone)

Video	**Audio**
Slide with telephone number of VITA site and VITA name	Free tax return preparation is available from the Volunteer Income Tax Assistance program. Call for details. A message from the Internal Revenue Service.

Draft News Release (VITA Volunteers)

Volunteers Needed To Help People File Tax Returns

Do you like to help people? Then VITA may be just what you're looking for. VITA—Volunteer Income Tax Assistance—is a program that uses volunteers from many walks of life to help taxpayers who cannot afford professional tax assistance, the Internal Revenue Service said.

VITA helps older, handicapped and non-English speaking taxpayers. VITA volunteers explain the many special credits and deductions and how people may claim them on their tax returns. In fact, the volunteers will help individuals complete the return, right down to any refund that may be due, the IRS said.

Who are these volunteers? People just like you—college students, law students, housewives, members of volunteer or community organizations, businessmen and women. You name it. An accounting background can be helpful, although it's not necessary, the IRS said. The IRS provides VITA volunteers with free instruction and all training materials necessary to prepare basic income tax returns. Training generally is conducted in December and the following January, which seems like a long way away but now is the time to sign up, the IRS said. Training is conducted at locations that are convenient for the instructors and volunteers.

Volunteers also are needed to help in other ways. Some volunteers organize sites, while others only do publicity for a site. IRS says, "If you've a skill and would like to help, VITA can find a way to involve you in the program."

VITA programs can be sponsored by local civic or fraternal organizations, educational institutions, churches and social groups. Assistance generally is provided at schools, churches, libraries and other neighborhood locations for the convenience of taxpayers who cannot travel to an IRS office.

If you or your organization want more information about starting a VITA program, contact _____ (local number) _____.

Radio Spots—Live Copy

VITA Offers Free Tax Help

:10

Need tax help, but can't afford to pay for it? Don't worry. Bring your tax forms to (place) on (date) at (time) for free tax help.

:20

Need help filling out your tax return? The Volunteer Income Tax Assistance program sponsored by the (organization) will assist you with basic tax returns. Bring your tax forms and other pertinent information to (place) on (date) at (time) for free tax assistance, or call (number) for details.

:30

Confused about all the changes in the tax law? How to fill out your return. Which exemptions, deductions and credits you can claim? (Organization) sponsors the Volunteer Income Tax Assistance program to help taxpayers who can't afford to pay for private help. Bring your tax forms and other pertinent information to (place) on (date) at (time) for free tax assistance, or call (number) for further information.

VITA Newsletter Item

VITA Offers Free Tax Assistance

Are you perplexed by the tax law changes last year and which credits and deductions you still can take? Free help is available through VITA, the Volunteer Income Tax Assistance program, sponsored by the _____.

Help with basic income tax returns will be offered on (date) at (location) by volunteers trained by the Internal Revenue Service.

VITA offers free assistance to older, handicapped and non-English speaking taxpayers who file Form 1040EZ, Form 1040A, or a basic Form 1040 Federal tax return. VITA volunteers also alert taxpayers to special credits and deductions for which they may be eligible.

Taxpayers who visit a VITA site should bring this year's tax package, wage and earnings statements (Form W-2) from all employers, interest statements from banks (Forms 1099), a copy of last year's tax return if available, and other relevant information about income and expenses. VITA volunteers must complete an IRS training course in basic income tax return preparation before they can assist taxpayers. Volunteers are trained to complete Forms 1040EZ, 1040A and 1040, the IRS said.

Draft News Release

Learn to Prepare Your Own Tax Return at a VITA Site

Would you like help with your tax return this year?

Free tax assistance is available through VITA, the Volunteer Income Tax Assistance program sponsored by _____(organization)_____, on _____(date)_____ at _____(time)_____ at _____(location)_____. VITA is designed to help older, handicapped and non-English speaking taxpayers prepare basic tax returns.

Trained volunteers teach participants how to fill out their own income tax returns. Interested individuals should bring this year's tax package that they receive in the mail, wage and earnings statements (Form W-2) from employers, interest statements from banks (Form 1099), a copy of last year's tax return, if available, and any other relevant information concerning income and expenses.

Draft News Release

Volunteers Are Needed for VITA

Release date: ( )
For more information contact: (name & telephone)

Volunteers are needed to help other people with their tax returns in the Volunteer Income Tax Assistance (VITA) program sponsored by (organization) in (city/town).

Volunteers provide free assistance to taxpayers who cannot afford professional tax help, particularly those who file basic tax returns. Volunteers assist older, non-English speaking and handicapped taxpayers.

VITA assistance is provided in neighborhoods at libraries, community centers, schools and malls which are conveniently located for taxpayers.

Persons interested in participating in the VITA program should contact (Name/organization) at (number).

VITA GOES to the Movies

By MEGAN PURSELL
Seattle District

Ever watchful for opportunities to promote VITA is Ann Gonzales, revenue agent and VITA POD coordinator in Tacoma. While relaxing on a Saturday in February at her local movie theater, she was surprised to find that the theater exhibited promotion slides before the films began.

"Why not VITA?" she thought.

Why not indeed! Ann contacted Donald Tigard, of the AMC theater chain in Pierce County, and Mr. Tigard agreed to exhibit the slides in their 20 theaters.

Few other urban theaters use slides, however, and many of the older theaters in smaller towns now exhibit only Spanish-language films.

If it plays in Tacoma, maybe other parts of the state . . .?

Within two weeks the slides were ordered for the AMC theaters, and Spanish-language slides also were printed. Then Bill Farrar went to work. As a revenue officer and VITA POD coordinator in Wenatchee, Wash., Bill is familiar with the needs of the large Hispanic community in that part of the state. Bill recruited three Spanish-language theaters to exhibit the slide promoting the local bilingual sites.

Thanks to Ann Gozales and Donald Tigard, and gracias! to Bill Farrar. Hooray for Hollywood!

Radio Spot — Live Copy

Learn to Prepare Your Own Tax Return

:10

Want to learn how to prepare your own income tax return? Bring your tax forms to (location) on (date) at (time) for free tax help.

:20

Want to learn how to prepare your own income tax return? VITA volunteers will teach you. VITA's the Volunteer Income Tax Assistance program sponsored by (organization). Bring your tax information to (location) on (date) at (time). For details about VITA call (number).

:30

Want to learn how to prepare your own income tax return? How many exemptions and deductions you have? Which special credits you can claim? VITA volunteers will teach you how to complete your return. VITA's the Volunteer Income Tax Assistance program to help taxpayers who cannot afford professional tax help. Bring your tax information to (location) on (date) at (time). For details about VITA call (number).

Draft News Release

Coordinators are Needed for VITA

Do you like to talk to people and do publicity work? Are you an organizer and good at getting other people involved? The VITA-Volunteer Income Tax Assistance program needs volunteers to help organize assistance sites and publicize the sites to the local community. If you think you can help a group in your area call (local number).

Draft News Release

Tax Counseling for Older Americans

Tax Counseling for the Elderly (TCE), a program coordinated by the Internal Revenue Service in cooperation with public and private non-profit organizations, provides free tax information and assistance to individuals age 60 and over, the Internal Revenue Service says.

Volunteers are specially trained by IRS to help older Americans with the tax credit for the elderly, their personal exemption, the special treatment of the gain on the sale of a home by an elderly person, the proper method of reporting pension income and paying tax on it when necessary, and other subjects of special interest and concern. These volunteers also will help taxpayers fill out their tax returns.

TCE is provided in neighborhood areas, which makes getting needed help easier and more convenient. Taxpayers age 60 or over should call the IRS tax information number listed in local telephone directories for locations in their area, and ask for the Taxpayer Education Coordinator.

OUR VOLUNTEERS ENJOY THE BEST BENEFIT PACKAGE OF ALL.

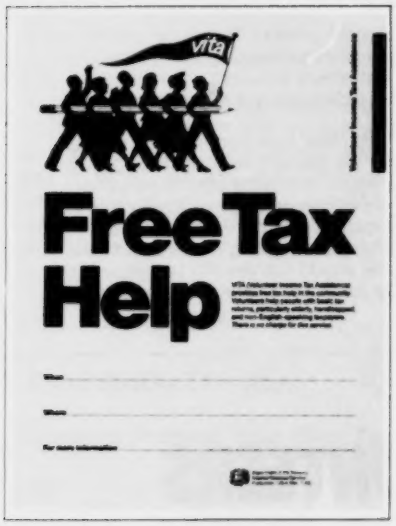
Volunteer your skills and experience. And you'll get the best benefit package of all: thank you's, smiles and handshakes from people whose tax questions you've answered. So how 'bout giving us some of your time? You'll benefit from it in every way. For free IRS training, call 1-800-424-1040.

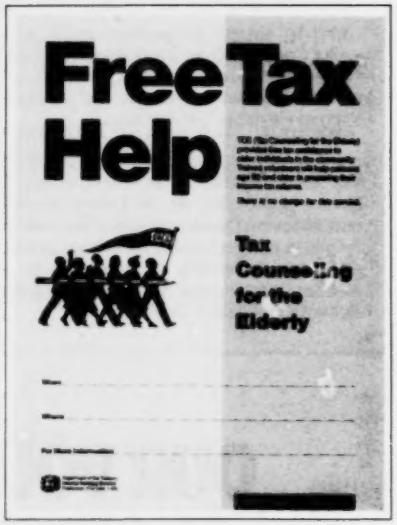
Internal Revenue Service

A Public Service of This Publication & Ad Council

Volunteer now. And you'll make someone's taxes less taxing later.

These items can be used to recruit volunteers and clients for VITA and TCE!





Request for Articles

The Volunteer Guidelines and Volunteer Coordinator's Handbook are written about you and for you as volunteers. Many of the articles that appear in these publications are submitted by the District Taxpayer Education Coordinator and VITA Coordinator. They are generally articles about your sites, your group, your volunteers and your publicity efforts. You may wish to submit your own articles for consideration in upcoming publications. You can do so by sending them to the Taxpayer Education Coordinator. A few simple guidelines can make your articles the type needed.

1. Keep them to around 200 words.
2. Make the topic of general interest.
3. Identify the place and people in any picture (Sharp black and white shots, please).
4. Look for an interesting angle to present your story.
5. Submit articles by May 1.

U.S. GOVERNMENT PRINTING OFFICE: 1989 - 239-922 - 814/00482

Suggested Timetable

August
- Recruit volunteers
- Draft news releases, radio spots and other items directed toward recruiting volunteers

September
- Meet with volunteers
- Select sites and determine dates and times

October
- Coordinate training classes with IRS Coordinator
- Determine schedule of operation for the site

November
- Begin planning publicity for filing season
- Submit orders for materials and tax forms

December/January
- Begin VITA training classes
- Coordinate publicity with IRS Coordinator
- Publish VITA site locations in the mass media
- Draft other items of publicity

February
- Visit VITA sites
- Collect photos and stories on VITA activity to submit to the IRS Coordinator for next year's Volunteer Coordinators Handbook and Volunteer Guidelines

March
- Visit VITA sites

April
- Submit names of candidates for VITA Certificates of Appreciation
- Distribute certificates/appreciation letters

May
- Evaluate program